

Taking Knowledge Services into The Organization

Marketing and Raising Awareness
Customer Service/CRM
Identifying Advocates and Champions

Taking Knowledge Services into the Organization

Here's What We'll Do

- Think about “world-class” specialized research library service
- Look at range of services offered, and strategic benefits of providing those services
- Discuss customer service (CRM)
- Review the marketing of Knowledge Services
- Discuss the value of raised awareness among all stakeholders
- Discuss who will (and will *not*) support your efforts, and think about who should be involved (and at what level)

Knowledge Services: Aligning with the Business Environment of the Host Organization

Focus on Five Key Issues

- Strategic Positioning
- Packaging
- Promoting
- Persuading
- Performing

- Sue Henczel

Knowledge Services: Defining the “World-Class” Specialized Research Library

A world-class specialized research library is one which exists to provide a borderless service, with the library being a function (and not always necessarily a place or a physical location) where information can be sought from wherever it exists, to be used immediately by local or remote customers. When we refer to the “world-class” specialized research library, we mean those libraries in organizations that offer specialized, mission-specific library services that are of the highest caliber, however library service is measured and judged in that “class” of organization.

Knowledge Services: What the “World-Class” Specialized Research Library Offers

1. Formal, structured marketing program
2. Strategic learning and training specifically focused on how the library benefits organizational staff
3. Electronic resource (particularly “push” technology)
4. Interlibrary loan/document delivery management that encourages a gradual move to customer-initiated requests (with product delivery directly to the customer)
5. Consultation services

Knowledge Services: What the World-Class Specialized Research Library Offers (Con' t.)

6. Research services for all functional units in the organization, including non-research organizational units
7. Direct intranet connection to the library's virtual "reference desk"
8. Distributed electronic tables-of-contents service for customers
9. Subject specialists and insourcing/research liaison programs
10. Experts database
11. Well-managed "knowledge area" on the organizational intranet
12. Organizational Knowledge Store/Clearinghouse

Knowledge Services: Strategic Benefits of Providing These Services

- directly relates to the established needs that the organization's stakeholders have in having services and materials onsite
- efficiency and effectiveness of research management with respect to the library customer's time, both labor and, if projects with deadlines are a part of his or her work, with the ability of the customer to access needed information as expeditiously as possible
- cost savings realized for the organization when experienced information professionals are able to locate information faster and more efficiently than library customers who do not have the professionals' expertise
- KD/KS (Knowledge Development/Knowledge Sharing)

Knowledge Services: Defining Customer Service

- “Service management is a total organizational approach that makes quality of service, as perceived by the customer, the number one driving force for the operation of the business.”

- Karl Albrecht

- Customer service – or good customer relations – can be described as expectations:
 - The expectation that a product will produce the benefits promised
 - The expectation that the service will be of the standard promised
 - The expectation that, if expectations are not met, the seller will make good on the promise
- Jacqueline Dunckel and Brian Taylor

Knowledge Services: Identifying the Drivers for Customer Service

- The value of the service (and the support to do what we're chartered to do for the organization that employs us, e.g., the empowerment to succeed – is determined by our users. If we cannot provide them with what they need for *their* success, something is wrong
- We want the 'repeat' business. We want to 'bring them back for more' because the more they use the specialized research library the more the library's role in the organization is enhanced
- We are service oriented – it is the core of our profession
- It's what we're there for, to support the overall mission of the organization which supports the specialized research library

Guy St. Clair

Customer Service in the Information Environment

From Librarianship to Knowledge Services

Berlin – May 2004

Knowledge Services: Customer Relationship Management (CRM)

- Speak a language customers understand
- Know the business of the parent organization (e.g., the wider industry)
- Know how the organization works
- Know where the specialized research library's services are needed and where these services add value (or *can* add value)
- Know which products and services are needed and how they should be delivered
- Know how to market and sell products and services
- Know how to constantly deliver and exceed expectations

- Sue Henczel

Knowledge Services: The Customer Survey

Why conduct a survey?

- To find out how the specialized research library is used
- To find out what customers need (or *want*)
- To find out if services provided are satisfactory
- To justify the need to keep the specialized library/knowledge center
- To justify the budget
- To question just how “virtual” the library should become

Knowledge Services: Marketing the Specialized Research Library

- Marketing: ‘...the management process responsible for identifying, anticipating, and satisfying customer needs profitably.’
 - Chartered Institute of Marketing, U.K.
 - Four essential features:
 - starts with the customer
 - takes a long-term perspective
 - makes full use of all the organization’s resources
 - is innovative
- Michael J. Butler

Knowledge Services: Marketing the Specialized Research Library

The Marketing Plan

(adapted from “Marketing the Information Service” by Fiona Bell *Handbook of Information Management*, London: Aslib, 2001)

- Product/services
- Price
- Place/location/distribution system (or *no place?*)
- Promotion
- People

Knowledge Services: Marketing the Specialized Research Library

Total Product (Service) Concept (adapted from Theodore Levitt, 1986)

The *generic* product or service – the basics, with nothing added to make it more appealing

The *expected* product or service – how the customer envisioned receiving the product or service

The *augmented* product or service – the ‘value add’ (which often becomes the norm in terms of customer expectations)

The *potential* product or service – customized or manipulated for the customer’s benefit

Knowledge Services: Marketing the Specialized Research Library

Product (Service) Life Cycle

Product/service introduction or launch – need has been established and the product/service is provided and promoted

Growth – more people become aware of the product/service and benefit from it, asking for more

Maturity – product/service has been available for an established time and customer usage has reached a plateau – there is little movement of new customers taking up the product/service and some customers drop out

Decline – existing users no longer want the product/service

Knowledge Services: Marketing the Specialized Research Library

Formulating the Marketing Plan

1. Diagnosis. Where are you going, and why?
2. Prognosis. Where are you headed if you continue on the current path?
3. Goals and Objectives. Plan at least one year ahead by asking yourself, what new markets do I want to develop?
4. Strategy. How are you going to get there?
5. Tactics. Draw yourself a road map. Who will do what, and when?
6. Control. “How are we doing?”

- Bettiann Welch
Success Magazine

Knowledge Services: Marketing the Specialized Research Library

Marketing – The Manager's Questions

1. What are my service standards? Do they meet my customers' expectations?
2. How does the physical layout/accessibility plan impact the delivery of Knowledge Services for the organization?
3. Are rewards for 'service-mindedness' built into my staff's performance reviews?
4. How many repeat customers do staff members have?
5. Do I review my staff's attitude and behavior toward customers?

- Ann Talcott

Knowledge Services: Marketing the Specialized Research Library

Marketing and Promotion in Today's Special Library

“One of the hardest things for us to recognize as information specialists / knowledge workers is that everyone in the organization which employs us does not think about us and our services as much as we do ... we are so involved in what goes on in the specialized research library ... that it comes as a shock to us to have others in the organization express surprise or wonder that we can provide a particular service.”

- Guy St. Clair

Customer Service in the Information Environment

Knowledge Services: Marketing the Specialized Research Library

Marketing and Promotion in Today's Special Library

“In managing the specialized research library, the marketing of services is no longer an option.... Despite its high purpose, a library and its services must be thought of and marketed as any other consumer product — albeit one of high standards and value. A formal marketing plan built on a clear message and including branded communications/marketing tools that convey that message to all stakeholders ensures that customers' attention is captured.”

- Guy St. Clair

Customer Service in the Information Environment

Knowledge Services: Advocates and Champions

Measuring Organizational Awareness

- Determine the role of information/knowledge/learning in the organization
- Establish the “awareness quotient”
 - Identify stakeholders: who uses (requires) information/knowledge/learning?
 - Who does not?
 - Is information/knowledge/learning management integrated into the organizational structure?
- Conduct a cost-benefit analysis and establish (precisely) the ROI
- Change organizational perceptions

Guy St Clair

Power and Influence: Enhancing Information Services Within the Organization, 1994

From Librarianship to Knowledge Services

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Knowledge Services: *Advocacy*

Why Advocates and Champions are Needed

Specialist librarians, Information specialists, knowledge services practitioners cannot – by themselves – ensure that support for their work is provided.

Why? Is it financial?

“While the technology permitted the information professionals to add much more value, it also greatly increased information expense. Rising expense made financial management the fundamental library management competency, while intensifying top management pressure on the library more generally.”

- Rich Willner

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Knowledge Services: *Advocacy*

Working With the Political Team

Turning managers in advocates

Establish personal contact

Communicate easily

Know when to pull back

Don't create trouble unnecessarily

Stroke

Identify and develop relationships with supportive users and peers

Identify external “players”

Knowledge Services: *Raised Awareness*

Understand the Value Statement
– “The Value Proposition” –
for the Specialized Research Library

- Benefits to the larger societal construct
- Benefits to the organizational mission
- Benefits to the profession and to ourselves as Knowledge Services practitioners
- At all steps and all levels: W I I F M?

Knowledge Services: *Raised Awareness*

Key Concepts

- Management development, employee retention, and leadership
- Total customer focus
- Entrepreneurial spirit
- Implementation focus

Knowledge Services: *Moving Into the Organization*

- Take on quick-turnaround, high-visibility projects (and self-initiated is best)
- Find supportive management
- Build a top-notch staff
- Keep up
- Understand marketing
- Work hard – and be fascinated by the work

Knowledge Services: *Providing the Knowledge Nexus for the Organization*

Our Thesis: Providing Knowledge Services to the organization

– that is, converging information management, knowledge management, and strategic (performance-centered) learning into one overarching management function –

leads to operational success for the specialized research library
(*knowledge nexus*)

- Information customers get what they need
- Specialized research library/knowledge services center is contributing to the successful achievement of the organizational mission
- Knowledge workers are happy and proud of the work they do

To Learn More About Knowledge Services

Articles by Guy St. Clair

- “Towards World-Class Knowledge Services: Emerging Trends in Specialized Research Libraries” (with Victoria Harriston and Thomas A. Pellizzi) *Information Outlook* 5 (6-7), June-July, 2003.
- “*Knowledge Services: Records and Information Management in the New Profession.*” *The Bulletin of The Records Management Society of Great Britain.* 111, October, 2002.
- “The Real-Time Enterprise: IT Makes It Possible—Knowledge Services Makes It Happen.” *Information Outlook* 4 (9), September, 2002
- “Knowledge Services: Financial Strategies and Budgeting.” *Information Outlook* 4 (6), June, 2002 (With Martina Reich).
- “Knowledge Services: Your Company's Key to Performance Excellence.” *Information Outlook* 3 (6), June, 2001
- “Qualification Management in Information Services: My Grand Design.” *Information Outlook* 2 (6), June, 2000

More on Knowledge Services

Columns by Guy St. Clair for *ChapterNews*, the quarterly membership publication of the Special Libraries Association, New York Chapter (www.sla.org/chapter/cny)

“Fix Knowledge Management? Move to Knowledge Services.” Spring, 2004.

“Knowledge Services: Building Your Organization’s Knowledge Nexus” Winter, 2003.

“Knowledge Services: Critical Infrastructure Protection: A Post-9/11 Scenario for Special Librarians” Winter, 2002.

“Knowledge Services: Misinformation on the Internet—Use Your Expertise to Raise Awareness” Summer, 2002.

“Knowledge Services: Specialist Librarians in the New Profession” Spring, 2002.

“Knowledge Services: KD/KS = Collaboration + Learning (of course) + Teaching” Autumn, 2001.

Knowledge Services: Message to Us—Get Started!” Summer, 2001.

From Librarianship to Knowledge Services

Berlin – May 2004

Beyond Degrees: Professional Learning for Knowledge Services

by Guy St. Clair

Foreword by Deanna Marcum

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Washington, DC*

2003 ISBN: 1-85739-264-7 Hardbound
315 pp. Published by K G Saur Munich

From Librarianship to Knowledge Services
Berlin – May 2004

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